

Special points of interest:

- An all-star cast of non-profit professionals make the event a success.
- Participants engage in identifying challenges and developing solutions.
- On-Line Survey data sets the stage for active problem solving.

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Non-Profit Summit

Executive Note . . .

Dear Friend:

Waukesha County held a Non-Profit Summit at the Waukesha County Exposition Center on Tuesday, June 10, 2003, from 8 a.m. to 12 p.m., which focused on health and human service-related needs in the community.

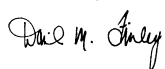
The purpose of the summit was to better understand the challenges facing our non-profits during these extraordinary fiscal times. Approximately 150 non-profit and community leaders attended the event to discuss issues like funding trends, workforce and healthcare issues, and collaborative strategies.

Waukesha County's non-profit sector is unique in that it helps fill gaps in service delivery for human service clients. From disabled persons to our senior population, non-profit agencies have a positive impact on the quality of life for all residents in the community.

The Waukesha County Non-Profit Summit was a successful event due to overwhelming support from local organizations and esteemed non-profit professionals. These volunteers spent countless hours planning the summit to ensure that the format was conducive to industry needs. I greatly appreciate all the time and effort that they contributed to planning efforts and their respective roles at the event. For a complete list of this group, please see the event program on page 2.

The summit findings have been compiled and are listed in the pages that follow. Please read through the information so that you can fully appreciate the circumstances effecting our valued and needed non-profit sector.

Sincerely,



Daniel M. Finley
County Executive



County Executive Daniel M. Finley

Event Program

8:00 a.m.	Welcome	CATHY BELLOVARY, Director Waukesha County Department of Senior Services
	Remarks	DANIEL M. FINLEY, County Executive Waukesha County
8:20 a.m.	Panel Discussion	SUSAN DREYFUS, Chief Operating Officer Alliance for Children and Families
		DIANE WALLER, Area Administrator Director State of Wisconsin Department of Health & Family Services
		PETER SCHULER, Director Waukesha County Department of Health & Human Services
		JAYNE THOMA, Executive Director United Way in Waukesha County
9:30 a.m.	Break-Out Session	KAREN GOTZLER, President Urban Economic Development Association of Wisconsin
		PAT LINNANE, Executive Director Planning Council for Health & Human Services
		STEPHEN PERCY, Ph.D. University of Wisconsin -Milwaukee Center for Urban Initiatives & Research, Director Milwaukee Idea, Chancellor's Deputy
		JANICE WILBERG, Ph.D., Community Planning Consultant Wilberg & Associates
10:45 a.m.	Reconvene Assembly	REPORT BREAK-OUT SESSION FINDINGS Karen Gotzler Pat Linnane Stephen Percy Janice Wilberg
11:15 a.m.	Reactor Panel	SCOTT GELZER Management Cornerstones, Inc., Vice President Nonprofit Management Fund of Waukesha County, Advisor
		FRED GUTIERREZ, Program Officer Greater Milwaukee Foundation
		HOWARD SNYDER, Executive Director Northwest Side Community Development Corporation
11:50 a.m.	Remarks	DANIEL M. FINLEY, County Executive
12:00 p.m.	Departure	

Break-Out Session Feedback

During the Non-Profit Summit, the general assembly was divided into four groups for break-out session purposes. Each group consisted of 35-40 people, including that of a facilitator and a recorder. Facilitators used the on-line survey, which is documented on the following pages, as a guide to lead attendees through rich discussion. Below are their compiled findings:

Challenges:

Funding	Operations	General
Lack of stable, long term funds	Cost of doing business	Need for agencies to work together for common goals
Funders that grant monies for new, innovative projects, which adversely stretch missions	Ability to afford technology that would increase productivity and track progress	Educate community leaders on industry needs and engage them in decision making processes
Short-falls in faith-based funding	Need to share resources within the industry: finance, grant writing, technology, real estate, etc.	Duplication of services
Private sector funding is too narrow and usually is designated to specific areas	Loss of volunteers, particularly retired seniors, because the economy is forcing them to go back to work	Not seen as viable sector for employment, which hinders an agency's ability to recruit and retain staff
Government budget problems effect the industry two-fold: 1. More clients 2. Less public money to work with	Affordable insurance: 1. health care 2. liability	Staff can't afford to live where they work
Need for consistent guidelines for outcome-based funding and the appropriate training for staff to support requirements	Staffing gaps related to gender-specific service delivery	HIPPA restrictions on volunteerism
Funders must be responsible for leadership roles.	Prioritizing time: managing business operations vs. service delivery	Transportation for clients
Identify and cultivate private wealth		Governing and advisory boards need to be more accountable and active in their respective organizations

Solutions:

1. Create a health insurance consortium for greater purchasing power.
2. Develop relationships with other industries, like institutions of higher learning, for technical training and support.
3. Share administrative duties and resources with other agencies.
4. Adopt longer funding cycles to implement innovative ideas called for in grant applications to lessen the administrative burden and to increase outcomes.
5. Work towards building trust between all partners via open dialog between agencies, funders, government, etc.
6. Educate the public about the importance of the services provided by the non-profit community.
7. Creative use of volunteers or interns to supplement staff.
8. Insist on addressing industry duplication by establishing benchmarks that encourage and promote shared services and facilities.
9. Provide incentives for exploring and supporting inter-agency mergers, like additional funds to address expenses, management and staff trainings to stabilize personnel issues, and access to business support for improved efficiencies.
10. Develop and implement a multi-organizational approach to cope with fluctuating demands.
11. Funders should put more emphasis on performance measures when awarding grants.
12. Use private sector models to increase operational efficiencies.
13. Look at collaboration from different perspectives: locally, regionally, and statewide.

On-Line Survey Results

Organizations that registered for the Tuesday, June 10, 2003, Waukesha County Non-Profit Summit that submitted an e-mail address were asked to participate in an on-line survey conducted between Thursday, June 5 and Monday, June 9. Of the 36 organizations that received the survey, 22 or 61% responded by Monday, June 9. The following survey results were presented at the Non-Profit Summit to facilitate discussion regarding local non-profit agency assets, challenges, and strategies:

1. Would you say the non-profit sector in Waukesha County is:

Response	Percent
Ahead of most counties in the U.S.	45%
Comparable to most counties in the U.S.	45%
Behind most counties in the U.S.	9%

2. Thinking about the non-profit sector as a whole, what do you see as its biggest assets or strengths?

Response	Percent
Partnerships & Collaboration	59%
Volunteers	55%
Innovative Programs	36%
Professional Staff	32%
High Quality Services	27%
Local Government	23%
United Way	18%
Foundations	14%
Elected Officials	9%
Technical Assistance Organizations	5%
Business	5%
Other: Passionate, Dedicated Workers	5%
Other: Funders	5%
Other: Length of Community Service	5%
State Government	0%
Technology	0%

3. What do you see as the 3 biggest challenges facing the non-profit sector in Waukesha County?

Response	Percent
Access to Funding	82%
Public Awareness & Marketing	45%
Health Insurance Costs	36%
Funding Restrictions & Regulations	32%

4. Please tell us the approximate size of your 2003 agency budget:

Response	Percent
Under \$250,000	14%
\$250,000 - \$500,000	19%
\$500,000 - \$1,000,000	19%
\$1,000,000 - \$1,500,000	14%
\$1,500,000 - \$2,000,000	0%
\$2,000,000 - \$2,500,000	10%
Over \$2,500,000	24%

5. About what percentage of your 2003 funding comes from government sources - cities, counties, state or federal?

Response	Percent
Under 25 %	40%
25% to 50%	25%
50% to 75%	15%
75% to 100%	20%

On-Line Survey Results continued . . .

6. During the past year, has your organization used any of the following services?

Response	Percent
Consultants	65%
Volunteer Experts	55%
Non-Profit Center of Milwaukee	50%
Non-Profit Management Fund	45%
University of Wisconsin-Extension	45%
Waukesha County Technical College	45%
Carroll College	40%
University of Wisconsin-Milwaukee	35%
University of Wisconsin-Waukesha	15%
Planning Council for Health & Human Services	10%
Other: "Executive Director Should Have Answers	5%
Other: Corporate Volunteers	5%

7. Does your organization currently participate in any partnerships, collaborations, shared service agreements, or other significant cooperative ventures with other non-profits or businesses?

100% said "Yes"

8. In Waukesha County, non-profit organizations have typically competed with each other for scarce resources. In your opinion, what is one positive thing and one negative thing about this competitive environment?

Positive

- Creates an environment where strategy is necessary for survival. While developing a strategy, an agency strengthens its ability to perform.
- Reduced institutional arrogance and focuses on the customer – both client and funding source.
- Each agency may have a certain aspect which can be a source of strength.
- Weeds out the truly needy from those just out for "frivolous" items.
- Hopefully, quality organizations emerge.
- Forces collaborative efforts and creative thinking.
- Force non-profits to eliminate duplication of services.
- Makes it imperative to know what it is your agency does and how that makes a difference in the community.
- Resulting networking and partnering.
- Sets the bar higher.
- Agencies have heightened awareness of services being provided and the outcomes achieved.
- Always good, forces everyone to perform at a high level.
- Fosters creative outcomes.
- Creates efficiencies and improves quality of services.
- Keeps groups performing at a high level.
- Because resources are scarce, providers come together to advocate for increased resources.

Negative

- Opportunities for partnerships are becoming more difficult.
- Too many agencies providing services in one area reduces the labor pool and can negate economies of scale in provision of services.
- May block efforts to collaborate.
- There isn't enough \$'s for us to keep going, most of the resources want to buy something and not help maintain day to day functions, like rent, etc.
- Can be very time consuming and demanding on directors.
- Sometimes collaborations, while they look good on paper, are not advantageous.
- Collaborations are viewed as potentially competitive, directors can feel territorial about programs, unsure if other non-profits will "steal" resources, force mergers, etc.
- Impedes collaborative efforts.
- Never enough money to go around.
- Larger non-profits are able to secure private funding easier because of high profile services/issues and better visibility.
- Duplication of services.
- Resulted in agencies misrepresenting data.
- More than performance, politics plays a bigger role in funding.
- Can stifle cooperation and collaboration to benefit the community.
- Poor communication, eliminates current and future collaborations and/or partnerships.
- Sometimes heartstrings play over ability to impact.
- Resources are spread too thinly which does not allow for programs to grow large enough which has a negative effect on productivity and economies of scale.

On-Line Survey Results continued . . .

9. What ideas do you have to strengthen non-profits in Waukesha County?

The following are direct quotes from survey respondents organized into several categories: Collaboration & Cooperation, Technical Assistance, Funding, and Other.

Collaboration & Cooperation

Regional cooperation is essential for strengthening our non-profits. We need to pool our resources and begin to address community needs collaboratively.

Establish greater interactive opportunities between the non-profit sector and Waukesha business.

Working partnerships with all cultures/agencies is vital for future existence and growth.

Have an organized group that meets to discuss common issues.

More collaboration with each other as well as funding sources.

Summit idea is great, need leadership forum s/groups such as Leaders Circle at Non-profit Center in Milwaukee to be held in Waukesha. Leadership needs the opportunity to discuss ad explore and dream, without egos/fear of passive "punishment" from funding sources if honest ideas/judgments are shared. We need to educate each other regarding programs. Even United Way member agencies don't understand the available programs, we are all so busy that we're not being efficient.

Encourage collaborations. Possibly by adding points to funding applications that represent collaborations. Possibly sharing resources.

Keep non-profits better informed of services to aid collaboration rather than duplication of services.

More summits like this one.

A positive, strength-based leader that will take the lead in bringing together the non-profits to develop further collaboration, combine existing resources to decrease duplication of services, to complete a community needs assessment and bring together the non-profits to address the needs.

Develop an agenda to deliver creative solutions to community needs by requiring collaborative programming to receive funds.

Venues for collaboration and opportunities to share information and resources.

Collaboration vs. competition.

Technical Assistance

There needs to be an organization that offers inexpensive classes for non-profit staff members to learn how to use computers, develop web pages, learn software such as databases and spreadsheets and how to maintain their computers. They also need classes on diversity, fundraising, board development, etc.

Funding

One of my frustrations is that funders want to support new, creative ventures. While there is a need for this, I believe this causes some non-profits to diversify so much, to improve cash flow, that it pushes the non-profit further and further away from their mission. With the economic issues facing the state and county, many non-profits are seeing more and more clients with less funding, putting a strain on the agency. I would like to see funders begin supporting existing programs to help sustain them while we ride this economic bump. I am afraid if we do not look at this, many non-profits are going to have significant problems, causing a glut on the Waukesha County system.

Stop funding agencies that have weak individual donor base s. If they are more dependent on grants than individuals, I would say they are not meeting the needs of the community.

Give agencies the room they need to operate. If government can run these programs better than the agency, then why give the agency any money in the first place?

Sharing of information when potential funds become available. Also, could the non-profits of Waukesha go to the state and ask for support to come together and purchase health care insurance through the state risk pool?

Other

Better awareness of the work that non-profits do. Some small non-profits may consider merging with large non-profits and create economies of scale.

On-Line Survey Results continued . . .

10. Collaboration can be a big asset for non-profits. What would it take for you personally to be involved in a collaborative effort to improve Waukesha County's non-profit sector?

The following are direct quotes from the survey respondents.

Guidance from local government and business leaders. United Way support and board member commitment.

Not much. I would have to see that the potential for a real benefit to the recipients of care and services would result, with the dollars available to make that happen.

Call the forums for discussion.

Sitting down and reviewing with my peers ways we could strengthen our programs. The only way we can move this process forward is first to be open to the potential. I am willing.

Someone to organize and manage a group of professionals with the county.

I guess I just have to be asked. It definitely is a worthwhile cause.

Convenient time for meetings, specific length of time for meetings, convenient location, goals and objectives obvious.

I am more than willing to look at any collaboration as long as it is within the scope of our mission and is done with solid organization.

Education, outline of what is collaboration: give me an idea of the objective, concrete steps, instead of a good-feeling idea. True collaboration must include some negotiation and compromise on all parts.

An invitation and an idea relevant to our mission, or supportive of our sustainability.

I've been collaborating since day one. Encouraging folks to get involved with the Waukesha County Community Council is an excellent way for people to get to know one another and find out what other agencies are doing.

That it is beneficial to all agencies in the collaboration.

My organization prides itself on its emphasis on collaboration.

It would take a leader in the community to bring all the non-profits together to make it easier for us to continue the collaboration process.

I would need to know that my time spent in that effort would bear fruit for my agency. I am pulled in many different directions and have limited time to give to outside activities.

A need I can solve with a partner(s) who is willing to collaborate and the funds to do it.

Open and honest communication. Clear definition of different non-profit roles (mission, vision, strategy, goals, objectives)

An invitation/opportunity and I would be there.

For us to be involved we would need to have a stronger presence in Waukesha County and be in a more leadership role.

Continually working on partnerships.

The on-line survey documented above was donated and conducted by Janice Wilberg, Ph.D., a community planning consultant with Wilberg & Associates. In addition to this service, Ms. Wilberg donated her time to help coordinate the Non-Profit Summit and acted as a break-out session facilitator.

Contact Information . . .

The 2003 Non-Profit Summit was coordinated by the County Executive's Office. For more information about the event, please contact the office at:

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